



**State of Rhode Island
Department of Administration / Division of Purchases
One Capitol Hill, Providence, Rhode Island 02908-5855
Tel: (401) 574-8100 Fax: (401) 574-8387**

**Solicitation Information
April 12, 2013**

ADDENDUM # 3

RFP #7461348

RFP Title: Rhode Island Health Insurance Contact Center

Bid Opening Date & Time: Monday, April 22, 2013 @ 11:00 AM (EST)

Notice to Vendors:

ATTACHED ARE VENDOR QUESTIONS WITH STATE RESPONSES.

NO FURTHER QUESTIONS WILL BE ANSWERED.

**David J. Francis
Interdepartmental Project Manager**

Interested parties should monitor this website, on a regular basis, for any additional information that may be posted.

Vendor Questions for RFP # 7461348

Question 1: Integration of technology – sounds like Rhode Island has all of these pieces to support HIX – brokers, premium billing, support to constituents; who is integrating this for you?

Answer to question 1: A combined team of Rhode Island staff and consultants along with our lead Integrator/Partner Deloitte Consulting.

Question 2: Does the system functionality support broker registration and commissions?

Answer to question 2: The system supports broker registration. Brokers will continue to receive commissions directly from the issuers, so the system does not directly support broker commissions.

Question 3: Will Customer Service Rep (CSR) have to answer questions about commissions?

Answer to question 3: The Customer Service Representative would direct questions about broker commissions to the appropriate issuer(s) to address.

Question 4: Handle time; is Rhode Island expecting handle time standards to be set?

Answer to question 4: Bidders should propose handle time standards based on their industry experience and expertise as well as any relevant benchmark data from the health insurance industry. Handle time may be included in the Bidder proposal for Key Performance Indicators (KPI) and as part of their comprehensive performance management program. Vendors should provide estimated handle time along with explanations for their estimate (i.e. based on call type, health insurance industry standards, or some other benchmark data). Rhode Island anticipates working with the Call Center Bidders to establish handle time standards that will be used and monitored during production operations.”

As described in Section 3.1.7, vendors should provide a substantive list of performance measures they believe are critical to the Contact Center, based on industry standards and best practices.

Rhode Island has included some additional sample metrics recommended by Contact Center experts in Appendix C: Contact Center Requirements Matrix. Vendors should describe and define the key performance indicators that they recommend and why as well as goals for meeting these performance indicators.

Question 5: Appendix C –column F doesn’t let you write past a certain point- can spreadsheet be unlocked so that Bidders can have more room to elaborate?

Answer to question 5: A new version has been posted that unlocks column F, per Addendum 1 to the RFP.

Question 6: What technologies do we want to leverage in this environment? What is the scope of services that Deloitte is providing, scope from any other service provider that we are integrating with in this work?

Answer to question 6: Vendor will leverage a web service to access the State's UHIP application. Deloitte is the state's system's integrator for UHIP. Please refer to the UHIP RFP for a complete scope of services. Details related to consuming the web services will be provided. Vendors are expected to create a web services API for their CRM solution. RI's goal is to create this interface within 6 months of production.

Question 7: What is the integration with our back end systems – UHIP portal or the CRM, is Rhode Island going to leverage other technology from Deloitte?

Answer to question 7: In combination with the answer to Question 6 above, the Contact Center vendor's back end system should be web service-enabled in order to communicate with RI's UHIP application. The Vendor's CRM should, over time, interface directly with UHIP in order to best inform the Contact Center staff. Vendor is responsible for providing a separate secure communication line with all necessary equipment to connect to the State's UHIP application located in Warwick, RI.

Question 8: Is there a need to name to language line service provider at the time of the RFP – or can Bidders name it later?

Answer to question 8: Vendors should indicate their intention to provide language line services in their proposal. The State must approve all sub-contractors; in order to expedite the purchasing process it is recommended that vendors name any subcontractors they anticipate using as part of their proposal.

Question 9: Do you expect Deloitte to release API web service specifications?

Answer to question 9: Yes, see response to Question #6.

Question 10: Key Staff – is the intent to have key staff on site in RI dedicated to project? Is it ok for them to be remote?

Answer to question 10: The State anticipates that key staff will need to spend significant time on site leading up to and through initial implementation of the Contact Center. Vendors should propose their approach for key staff. If a Bidder's approach involves key staff working remotely the Bidder should provide a detailed explanation of how the Bidder anticipates this working efficiently and effectively for Rhode Island's tight timelines during implementation and initial operational months.

Question 11: How many staff from Exchange would RI anticipate being co-located in Contact Center with the Vendor?

Answer to question 11: Rhode Island expects a few key Exchange staff integral to overseeing and managing the Contact Center to be co-located with the Vendor throughout the engagement. Additionally, the Exchange is identifying office space options for all staff; co-locating the full Exchange team with Contact Center is one option under consideration. If the Exchange exercised this option, we anticipate 20 or more team members possibly sharing space with the Vendor. Please clearly define assumptions used by the Vendor in the cost proposal narrative and marginal cost (if any) associated with this option within the cost proposal as a row in the Start-up tab under “operating costs”.

Question 12: How many licenses is RI looking to provide to other agencies for the technology/CRM licenses?

Answer to question 12: Please refer to page 23, Section 3.2.5 in the RFP. In support of the Rhode Island vision of integrated, seamless customer service the State would like all customer-facing staff to use the same CRM technology. This would allow for staff across agencies and organizations to share customer information, creating a positive experience.

Some examples of customer support staff that would benefit from this shared technology include support staff for the Office of the Health Insurance Commissioner (OHIC), the Department of Human Services, and Medicaid, as well as Navigator/In person assister agencies.

Vendors should provide the State with price per license and any changes in price based on volume discounts. In order for Vendors to provide consistent estimates, please use the following ranges for number of licenses: 50 or fewer, 51-100, 101-300, 301-500, 501+, including per license and volume discounts by number of licenses.

Question 13: Can you talk about the Premium Billing vendor?

Answer to question 13: The scope of the Premium Billing vendor is documented in the original UHIP Program RFP Section 4.2.9. The Premium Billing vendor NFP Health (www.nfphealth.com) is a sub-contractor to Deloitte Consulting and will provide the billing of subscribers and payments to carrier functions for the exchange. Interactions between the Contact Center (this RFP) and the Premium Billing vendor are a critical element of the scope of this procurement. The winner of the Contact Center will be required to work directly and intimately with NFP Health addressing and resolving billing questions and issues.

It is anticipated that the Contact Center will be the primary contact relating to billing and payment inquiries. To accomplish this, the State anticipates that all contact will come to the Contact Center and if billing related, the

Contact Center staff will work directly in conjunction with the NFP staff (e.g. via conference call with the caller or via other means as identified in this RFP) and will be responsible for recording, logging and documenting all activity relating to financial matters. NFP will provide the information and expertise. The Contact Center vendor will be responsible for all aspects of CRM, document management, contact management, etc. for billing matters.

Question 14: Will CSR have access to premium billing system – see info in CRM solution? Will they have to go outside to check PB system?

Answer to question 14: Please refer to page 14, Section 3.1 in the RFP, which describes that checking billing status is a key function of Contact Center Staff. CSR's will have access to view the premium billing data in individual's accounts in order to resolve customer inquiries. This system will be accessible on the CSR's desktop. Also see the answer to Question 13 above.

Question 15: Can we use certified MBE's from other states?

Answer to question 15: No, all firms must be certified by the RI Department of Administration's, MBE Compliance Office in order to qualify as a MBE / WBE. They may be from another state but they would need to be certified here. The anticipated processing time for an application is 8 - 10 weeks. Applications are available at www.mbe.ri.gov and we use the Federal Disadvantaged Business Application for all certifications

Question 16: Could you share more on the vision of integrating Medicaid support into the process/solution/call center services?

Answer to question 16: As described in section 2.2, *Rhode Island's strategy for customers supported by the Contact Center*, Medicaid will be fully integrated into the Exchange/UHIP platform. The Contact Center would provide assistance to all customers in order to facilitate the automated enrollment process. The contact center will need to be proficient in its abilities to explain all health and dental coverage options, including eligibility options for Medicaid. The Contact Center will assist all Rhode Islanders that require assistance navigating the web portal.

In addition, on page 12, section 2.3.1 Rhode Island explains that State may be making additional services available through the web portal in 2015, which may present the opportunity for additional customer inquiries through the Contact Center.

Question 17: Can you explain current state of Medicaid customer service and support?

Answer to question 17: Currently customers apply for Medicaid through an appointment with one of several DHS Field Offices, by calling the RIte

Care Info Line at (401) 462-5300, or by submitting applications through the mail and are collected and processed manually (paper). The RIte Care Infoline handles between 2500-3000 calls per month.

Customer service and support relative to Medicaid applications, re-certifications, and collection of premiums is handled internally in regional DHS field offices.

As described on page 18 of the RFP, section 3.1.1 the DHS offices will continue to provide assistance for customers along with the newly created Contact Center.

Question 18: Will Customer Service Reps (CSR) need to be multi-lingual in live chat, email as well as phone? Will IVR and web be in multiple languages?

Answer to question 18: Rhode Island's top two non-English speaking citizens are Portuguese and Spanish. Vendors should have CSR's who speak both of these languages. IVR menu choices should be available in Spanish and Portuguese. In addition, Vendors should be able to provide support for Live Chat and Email responses written in Spanish and Portuguese. The web will be available in both of these languages; the Portuguese website may "go live" shortly after the English and Spanish versions are available.

For Medicaid cases, Rhode Island is bound by legal agreement with the Federal Office of Health and Human Services (OHHS), Office of Civil Rights. The Office of Civil Rights Agreement requires translation of written documents under certain conditions. At this time, Rhode Island is required to provide translation of all existing vital documents into any language spoken by 5% of the total population eligible to be served or likely to be directly affected or encountered by RIDHS programs, or one thousand (1000) persons in that population, whichever is less.

Question 19: What are the minimum language requirements? Aside from Portuguese and Spanish, what other languages will the Contact Center need to support?

Answer to question 19: As stated in the RFP on page 21, section 3.1.15, outside of Spanish and Portuguese the Contact Center will need to provide language translation services for any customer who needs this assistance. RI's expectation is that the Contact Center will have staff on site that speak Spanish and Portuguese, and will use a language line service for all other language inquiries.

Question 20: Will RI provide train the training template for training staff? Or will vendor need to provide training template?

Answer to question 20: As described on page 20, Section 3.1.11 in the RFP, RI does not have a specific training template required for training

materials or staff. RI will provide the Vendor with all necessary content to train Contact Center staff on key functions outlined in the RFP.

The Vendor should use the content the State will provide the vendor and plan to put them in format or templates that they find most effective and successful. All training plans, templates and training materials created by the Vendor will need to be reviewed and approved by RI.

Question 21: Will there need to be any licensure for CSR staff?

Answer to question 21: Rhode Island does not require Contact Center staff to be licensed. Staff will not be selling, soliciting or negotiating insurance. Contact Center staff will provide unbiased support for customers who want to understand health coverage options available to them, assistance enrolling in coverage, etc.

Question 22: Could you expand on your vision of customer service surveys and what you are requiring of Vendors in that area?

Answer to question 22: As explained on page 19, section 3.1.6 of the RFP and Appendix C (SLA tab), customer satisfaction is a key performance indicator. Customer service surveys are the primary way to measure customer service and how satisfied customers are with their interaction with the contact center as well as with the products, services, and programs being offered through RI's Exchange. Vendors must use customer satisfaction surveys on a regular basis and provide the results to the state along with their analysis. Vendor should propose survey frequency, methodology (e.g. use of outside vendor to perform survey, post call surveys, etc.), reporting of results, etc.

Question 23: What about social media – do you intend to interact with brokers through Facebook, Twitter? Are we marketing through social media? Are we tracking customer use of social media? Do you want CRM to monitor this use?

Answer to question 23: Rhode Island is planning its social media strategy, and will use all channels for marketing, outreach and service/support to customers. Tracking customer use of social media is aligned with our strategy; RI is interested in the Vendors' experience on how CRM can be leveraged to monitor and track social media.

Question 24: Is the CRM eventually going to support the technology for EOHHS – expandability/scalability requirements?

Answer to question 24: See response to Question 12 as well as page 12, section 2.3.1 in the RFP.

Question 25: Across the communication channels; web chat, text – are you seeing some as more transactional and some as more informational?

Answer to question 25: Rhode Island is excited to offer service to its customers through a variety of channels. The state will target specific channels for specific use and populations. Vendors should provide proposals based on their experience and successes using multiple channels effectively.

Question 26: Can smaller font sizes be used in graphics for the proposal?

Answer to question 26: Font sizes in graphics should be legible but do not need to meet the font requirements described on page 31 in the proposal.

Question 27: Sending info on references from other organizations, value of work at those clients; they are confidential pieces of information – are those ok to put in packet? Should that be in a separate, sealed envelope? Concerned by public disclosure of confidential information.

Answer to question 27: Offerors are not required to put reference information in a separately, sealed envelope. Offerors should specifically identify and disclaim any reference information that it deems to be confidential in the technical proposal and the State will take this into consideration in the event of an Access to Public Records Request. Please note that only specific information that is claimed as confidential should be so identified. The State does not expect to receive entire sections of bids designated as "confidential."

Question 28: Can the PRE-BID Proposal Conference be accessed via teleconference? If so can you provide the call in numbers?

Answer to question 28: No.

Question 29: If primary contact center is in Rhode Island is it acceptable to allow rollover to another center located outside the state during peak enrollment periods?

Answer to question 29: Meeting service levels and answering customer calls and contacts is the priority for RI's Contact Center. Vendors should propose overflow solutions for peak call periods, including use of other contact centers, their location, sub-contractor use, service levels or any additional impact on RI when using an additional center for support.

Question 30: Will the State allow a smaller font size for graphics/exhibits/figures/flow charts/org charts? Can a San Serif font (such as Arial) be used in these items? (Section 5, p.31)

Answer to question 30: See response to question #26.

Question 31: Will the State allow a smaller font size for tables, such as San Serif font (such as Arial)? (Section 5, p.31)

Answer to question 31: See response to question #26.

Question 32: Will the State please clarify what is meant by “resumes” from the vendor company and any subcontractor? (B) Relevant Experience and Expertise – Qualifications, p.32)

Answer to question 32: Vendors should provide resumes of any key staff and management team proposed. Resumes of key staff involved in this engagement should be provided by the vendor as well as any staff involved from subcontractors.

Question 33: What is the current state of readiness of key UHIP components (eligibility system, Web portal, financial management, etc.)? What are the Exchange’s expectations for the services to be delivered through the contact center should those components are not available for Oct 1?(Section 3.2.1 UHIP/Core System, p.22)

Answer to question 33: Rhode Island is moving forward expeditiously to implement the UHIP solution to support open enrollment beginning October 1. We are working with our federal partners to develop a plan to operate even if some of the key UHIP components are not fully automated on October 1. If we needed to invoke this plan, we expect that the Contact Center may experience additional volume of inquiries and transactions, and will provide integral operational support to the State. Our initial analysis suggests that if the UHIP solution is not fully automated by October 1, the Contact Center may experience higher initial volumes in the following types of transactions across all customer types (individuals, families, employers, employees, brokers, Navigators, etc.):

- Account creation, authentication, and updates (i.e. password updates)
- Assistance for browsing, filtering, comparing, and selecting plans
- Data entry of information, including application intake, eligibility determination, plan browsing, decision support, selection, enrollment, and disenrollment
- Tracking, coordinating, and resolving inquiries (i.e. payment discrepancies, complaints, technical issues, etc.)
- Searching, filtering, and referring individuals to in person assistance

In their responses, vendors should describe their approach to working with the State to support these operations, and should clearly indicate in their cost proposal the cost impact of this support as a distinct row priced in the “Start Up Costs” tab.

Question 34: Will the State please confirm if vendors should submit resumes for the four key named positions? If so, please confirm that it is acceptable to include as an attachment and not count towards the 35 page limit. (D) Capacity to Accomplish Tasks – Project Organization Chart, p.33)

Answer to question 34: Yes. Resumes may be attached, and not counted toward the 35 page limit.

Question 35: How does the Exchange envision anonymous application assistance/eligibility screening to occur via the Contact Center? For example, will CSRs have access to the UHIP web portal so they can walk a caller through the anonymous pre-screening process? (Section 3.1.2 Organization of Work, p.16)

Answer to question 35: When RI refers to anonymous application assistance/ eligibility screening it means that the customer who is calling has not been identified as eligible for a specific program yet. This customer is a general shopper who would like assistance in more generic way without supplying personally identifiable information. RI's web site, contact center and in person assistance channels will support this type of customer inquiry.

CSR's will access the UHIP web portal to walk a caller through the anonymous pre-screening process.

Question 36: Appendix E and Appendix F are not found within the RFP. Are vendors required to submit these Appendices with their response, and if so, can the state please provide them? (Section 8 Appendices, P.40)

Answer to question 36: Appendix E – Debarment Certification is attached and should be submitted by the vendors with their response. Appendix F – Business Associate Agreement is attached and would be submitted by the vendors upon tentative selection.

Question 37: The State has indicated that “Rhode Island is interested in creating jobs in Rhode Island and promoting close cooperation between State officials and Contact Center staff. To that end, contracting with a vendor that will locate in Rhode Island and hire local staff will weigh strongly in the evaluation of the RFP” However, the formula used to evaluate pricing favors low cost and penalizes vendors that incur higher costs as a result of locating in Rhode Island. For example. A vendor whose pricing is 10% higher than the lowest cost vendor for start-up and cost-per-call as the result of locating in Rhode Island incurs a 3 point penalty (1 point for start-up; 2 points for cost-per-call). Would the State consider including an explicit 5 point bonus for vendors that commit to locating the Contact Center in Rhode Island? (Section 6.1 Evaluation Criteria: Cost, P.37).

Answer to question 37: No. 70% of the evaluation is not cost related, and locating the center in Rhode Island will be explicitly considered within the technical evaluation. Please proceed according to the original instructions.

Question 38: Will the State please clarify exactly what type of calls the contact center will take and what type of calls OHIC will take once the contact center is operational? (Section 3.1.1 Key Functions. P.16)

Answer to question 38: As explained on page 16 of the RFP, section 3.1.2, the State sees the Contact Center as integrated and accepting initial calls from Rhode Island customers, which then may need to be triaged to other state agencies, RI organizations, and/or the Premium Billing contractor. Pages 17-18 of the RFP, section 3.5.1 specifically explains the types of calls that OHIC and/or RIPIN will service. In order to assist in the process of complaints and appeals the Contact Center would need to be able to discern what constitutes a complaint and/or appeal and in doing so will need to be able to answer general health care “system” questions i.e. consumer assistance/inquiries.

Question 39: Considering the complexity and size of this procurement, would the State consider increasing the technical proposal page limitation to at least 100 pages? (5.1 Technical Proposal, P.31)

Answer to question 39: The State will agree to increase the length of the technical proposal response to 50 pages. Vendors should make every effort to be concise and efficient in their responses.

Question 40: To allow vendor to provide a competitive proposal, what are the anticipated types of paper mail, mail volumes by document, etc. (3.1.19 Mail, P.22)

Answer to question 40: Rhode Island anticipates many customers will utilize automated and electronic formats/channels. The State anticipates that some mail will need to be received and processed by the Contact Center in order to support customer inquiries. Mail coming into the Contact Center will be *only* directly related to customer contacts received by Contact Center, such as follow-up or documentation requested. Vendors should use the population estimates provided in the RFP (page 12) as well as their industry experience to identify contact volumes, including associated mail.

Question 41: What is the projected number of users, by organization or agency, to be provided with additional licenses? How will the vendor be reimbursed for these licenses? (3.2.5 Technology Accessible to Designated State Agencies and Representatives p.23- Appendix C Tech-14)

Answer to question 41: See response to question #12.

Question 42: Please clarify what technology licenses. Do all licenses include all proposed technology, only the CRM, only the telephony, or a combination of technology? (3.2.5 Technology Accessible to Designated State Agencies and Representatives p.23- Appendix C Tech-14)

Answer to question 42: Vendors should provide a proposal that outlines the specific cost to provide additional users with technology licenses. As described in the response to question #12, the Vendor should detail out technology by application and cost per license, or if it can be packaged together in one suite of programs for users. If there are incremental costs

as applications are added, that should be made clear in the Vendors response.

Question 43: Would the State consider a per user pricing model that would allow the state to only pay for the licenses as they are assigned? (3.2.5 Technology Accessible to Designated State Agencies and Representatives App.C P.23 Tech-14)

Answer to question 43: Yes, please see response to Question #12.

Question 44: To allow vendors to provide a competitive proposal, can the State please clarify the projected volume and types of paper documents the vendor will be responsible for mailing? (Appendix C)

Answer to question 44: See response to question #40.

Question 45: Given the currently unknown volumes for mail, would the State consider reimbursing the contractor for postage? Or consider it as a pass-through item? (Section 8.5.1, p.53)

Answer to question 45: Yes. Postage can be billed as a pass-through. Vendor is expected to provide optimal postage rates to the State based on volume. Additionally, pass through charges will be subject to audit by the State.

Question 46: Please clarify where the vendor should include the response to Appendix C. Given that the excel file is at a minimum 12 printed pages without any responses, will the State confirm the response to Appendix C is not included in the 35 page count? (Section 5- Proposal Submission)

Answer to question 46: The State expects all vendors to respond to Appendix C. Responses to Appendix C is NOT included within the page count of the technical proposal.

Question 47: In our experience, written translation can often been confusing and cannot be as effective as verbal communication. This often results in multiple follow up contacts. In order for vendors to propose a cost effective solution and help minimize participants confusion, will the State consider limiting written translation to English and Spanish. (Appendix C, GEN – 9)

Answer to question 47: Please see response to question #18. Additionally, the State will follow Federal civil rights agreements in developing multi-lingual notices for customers. Rhode Island will be creating standard notices, and create translations in the most commonly requested languages, including Spanish and Portuguese. These notices will be available to the Contact Center to send out in an automated way via the State's technology system and fulfillment center.

If the Contact Center needs to communicate with a customer outside of this State correspondence they should use the language line services for oral interpretation of the notice or letter for the customer.

Question 48: Please provide the anticipated number of Rhode Island Exchange staff that would need to be co-located with the contact center. (Appendix C, p. GEN – 16)

Answer to question 48: Please see response to question #11.

Question 49: Please confirm that the vendor will have access to the financial management system to accept and process payments. To help ensure appropriate PCI and IRS controls, please confirm that we will not be required to record payments or other financial information in contact center systems. (Appendix C, BUS-12.1)

Answer to question 49: Please see Answer to Question 7 and 13. Payment information will be stored in the Premium Billing vendor's system. Financial information will not be stored in the Contact Center vendor's system; however, appropriate security controls and procedures must be followed in accessing this confidential information.

Question 50: Please clarify whether referrals and coordination will be managed through access to the UHIP technology and workflow processes. For example, if an application needs review by the Medicaid agency, will it be necessary for communication outside of the Web Portal, or will the vendor be able to identify the application record in the UHIP system for the agency's review? (Appendix C, BUS-13)

Answer to question 50: Rhode Island's UHIP technology will have workflow management capabilities, but may not have them available for operation by October 2013. The CRM technology proposed by the Vendor should also have the ability to route work to other areas or staff within the Contact Center. The State will explore the option of using CRM or UHIP for these types of communications.

Question 51 Please clarify the scope, type, and anticipated volume of "other outgoing communications." (Appendix C, BUS-16)

Answer to question 51: Please refer to page 21 section 3.1.17 and page 22, section 3.1.19 in the RFP relating to outgoing mail and other communications. For example, the Vendor should have the ability to mail documents to a customer if requested, such as paper applications, letters, brochures, notices. Rhode Island expects that most documents will be sent electronically, but there may be customers who request paper and the Vendor is required to comply. Additionally, the state may need to conduct follow up calls with customers who make an inquiry about the status of their enrollment or looking for information that may suggest it is more efficient to call back the customer at a later time.

Question 52: Will the State consider reduced hours of operations during non-open enrollment periods? (App.C-STAFF-1)

Answer to question 52: Rhode Island's customer service strategy is to provide robust support through a variety of channels. Vendors should propose two options for operations, as explained in the RFP on page 21, section 3.1.12. If, over time, experience and analysis indicate demand for hours of operation other than the two options outlined in the RFP, the State will consider alternative hours of operation. The State will consider the most efficient means for staffing while maintaining a high level of customer service.

Question 53: Please provide the anticipated number of Exchange staff that would need to be co-located with the contact center. (App.C-STAFF-5)

Answer to question 53: Please see response to question #11.

Question 54: In order for the Vendor to provide a more convenient location for consumers, will the State allow an alternative location for the "store front" to support walk-in customer assistance, not physically located with the Contact Center? (App.C-STAFF-6)

Answer to question 54: Yes. Vendors should propose options for the State to consider that may be convenient for the customer while minimizing cost to the State.

Question 55: Because of the cell limitations in Appendix C, please clarify whether the Vendor should provide examples of Training Program content and techniques within our Attachment Section to Appendix C. (App. C, TRA – 2)

Answer to question 55: As described in response to question #5, a new version has been posted that unlocks column F in Appendix C. Vendors may provide examples of content and techniques as an attachment to the technical proposal.

Question 56: Please clarify whether RI's Technology Vendor will provide training material on their systems, or will provide base material and documentation to support the development of training materials by the vendor. (Appendix C, TRA -2)

Answer to question 56: Rhode Island's systems integrator will provide training and training materials on their system. Training will be in the form of "Train the Trainer" sessions where the Contact Center vendor will then train their staff on technology systems. All of the materials provided by the technology vendor can be organized or formatted to accommodate the Vendor's needs. Also see the response to Question 20.

Question 57: As an electronic signature should be associated with the application in the Exchange, please clarify the vendor's responsibilities for accepting electronic signatures. (App. C, TECH 2.10)

Answer to question 57: The Affordable Care Act will require states to accept electronic signatures in 2014. Therefore, the Contact Center will

need to support phone applications and telephonic signatures for those enrolling in health insurance programs through the Exchange. A telephonic signature is a type of electronic signature that uses an individual's recorded verbal assent in place of an ink signature, and it is considered legally enforceable in both the private and public sectors under certain conditions.

Per the RFP, page 24, section 3.2.10 Vendors should explain if they support electronic signatures currently, and if not, how they can support this requirement in the future.

Question 58: Please clarify whether the State will provide the design and content (banners, etc.) of HTML messaging. (App. C, TECH 2.9)

Answer to question 58: Yes, the State will require the Contact Center vendor to use its name, branding, logos and messaging on all communication, which includes any electronic communication, such as email.

Question 59: Can the State please provide an example of the State PSI form? Please provide information/guidance on the distribution of this form. Is the vendor responsible for bulk printing of the forms? (App. C, PERM-1)

Answer to question 59: Please disregard this requirement. The State is deleting the requirement from the RFP.

Question 60: To protect the security and confidentiality of our clients and the data they entrust to us, our security plans are not available for distribution. Will the State please clarify what constitutes "evidence of a Data Security Plan" for Call Center operations? (App. C- Sec 1)

Answer to question 60: Section 3.2.11, page 24 in the RFP. Please provide a sample security plan that may be used for the Contact Center operations. Do not include any security confidential information. Vendors must provide evidence in their proposal or commitments that they have robust compliant security technology and procedures.

Question 61: Please confirm that the Data Security Plan for Contact Center operations is a contract deliverable, and not a proposal submission requirement. (App. C- Sec 4)

Answer to question 61:Section 3.2.11, page 24 in the RFP, that is correct, can be submitted once contract is awarded.

Question 62: Section 2.1: Regarding the requirement to service hearing impaired consumers, does this include having onsite agents who know sign language to accommodate walk in customers?

Answer to question 62: Rhode Island does not require agents on site who know sign language for walk in customers. RI does require, per the RFP, page 14, section 3.1, that TDD/TTY technology be available to support the deaf or hearing-impaired customers. This technology can be used over the phone and in person.

Question 63: Section 3.1.10: What are the requirements for measuring employee satisfaction?

Answer to question 63: Vendors should provide RI with their own description of how they measure and promote employee satisfaction, including any relevant examples.

Question 64: Section 3.2.2: Explain the auto dialing/predictive dialing requirements noted here and in Appendix C, TECH 2.5 & 2.11. What will they be used to accomplish? Can it be confirmed that the State is expecting the use of auto dialing to perform customer satisfaction surveys or is the method for obtaining this information up to the chosen Vendor?

Answer to question 64: The auto dialing and predictive dialing requirements referenced in the RFP were based on desired functionality to allow customer call backs in case of high wait times, or use of automated outbound calling for customer messaging (reminders, outreach) or to support customer satisfaction surveys. If Vendors have alternative ways to accomplish this functionality based on experience and industry expertise they should include details in their response.

Question 65: Section 3.2.2: Are there any specific requirements regarding the knowledge management tools the Contact Center must possess? Can these tools be internally developed, or do they have to be provided by a recognized 3rd party as with the CRM application?

Answer to question 65: Rhode Island seeks dependable, versatile and functional system solutions to support customer service operations. Vendors should propose a Knowledge Management tool in which the vendor has confidence. As with all technology solutions, the State may request to see a demonstration of the solution, proven effectiveness of its functionality and any client references that will demonstrate satisfaction.

Question 66: Section 3.2.10: With regards to telephonic signatures, does the verbal agreement have to be recorded in a mode that can be played back as evidence if challenged?

Answer to question 66: As described on page 24, section 3.2.10 and in response to question #57, federal law requires telephonic signatures. Verbal agreements should be able to be recalled for evidence in the event that the consent is challenged.

Question 67: Schedule 10: Will the State entertain alternate service level achievement targets other than those specified in Schedule 10?

Answer to question 67: Yes. Vendors must include the three minimum requirements – Speed of Answer, Abandonment Rate and Customer Satisfaction. Vendor should provide recommended service levels based on their own success, expertise and industry standards.

Question 68: Can the Contact Center work be segregated to various service representatives based on call type/knowledge base?

Answer to question 68: Yes. Rhode Island expects vendors to propose any segmentation and organization of calls based on type, knowledge, specialized populations, etc. based on their expertise and industry experience and what will provide best service experience for customers. RI will review and approve call routing and segmentation prior to implementation.

Question 69: Are there any restrictions on utilizing cloud-based applications/infrastructure?

Answer to question 69: No. A cloud option would be fine as long as it will support all integration required and as long as the cloud solution does not negatively impact timelines or security.

Question 70: Are there any specific goals that you are asking us to achieve related to affirmative action?

Answer to question 70: The only goal related to affirmative action is the 10% requirement for MBE.

Question 71: Where on the purchasing website will the list of those who attended the pre-bid vendor conference appear?

Answer to question 71: The attendance list can be found at <https://www.purchasing.ri.gov/RIVIP/StateAgencyBids/7461348A1.pdf>

Question 72: Will the vendor be responsible for outbound marketing campaigns? If so, what is the anticipated frequency and type of campaign? (App. C, BUS 16)

Answer to question 72: Vendors are required to provide capability for CSR's to make outgoing calls as it relates to a customer follow up issue (App. C, BUS 16). Additionally, RI would like the Contact Center Vendor to provide support during open enrollment periods, which may include outbound calls to follow up on pending, outstanding or potential enrollment leads. Frequency of such campaigns would likely be 1-2 times per year, and could be heavier in volume in the first year of operations as RI introduces this new program.

Question 73: Can you give any guidance on expected contacts per month and what the average contact time would be? Would you see that varying quite bit during the open enrollment periods?

Answer to question 73: Rhode Island developed very preliminary estimates on call volume based on the Massachusetts experience for both Medicaid and the Connector, which is the only available benchmark to date. While some estimates for call volume have surfaced in the press, vendors should be cautious when using this volume estimate as basis for their proposal. Vendors are strongly encouraged to make their own estimates based on industry experience as well as the data provided on page 12, section 2.3.2 of the RFP. As described in section 2.3.2, vendors must have flexibility and scalability to staff accordingly and meet the somewhat unpredictable demands as the program begins rolling out in October 2013. In their technical proposal, vendors should explain how they plan to handle call overflow, including response times, capacity and any related costs.

Question 74: The requirement of NCIC III nationwide criminal background checks takes background information to the misdemeanor level. Today our background checks go to the felony level and to the misdemeanor level only for fraud, perjury and theft. Would this suffice?

Answer to question 74: No. Background checks must comply with the terms of the RFP.

Question 75: It was brought up at the meeting that IVR prompts and web chat would need to be available in multiple languages would English and Spanish suffice?

Answer to question 75: See response to questions #18 and #19.

Question 76: Will all the necessary training for CSR's on the UHIP system and the procedural and knowledge requirements be provided by the state or the states technology vendor or will we need to build that training ourselves?

Answer to question 76: See Answer to Question 20 and 56.

Question 77: RFP # 7449637 Unified Health Infrastructure Project includes technology which appears to overlap with technology requested in RFP # 7461348 for the Rhode Island Health Insurance Contact Center. To help Vendors present the appropriate solutions, not already accounted for in the UHIP project design (e.g., not included in the final contract with the UHIP vendor), would the State please provide a list of the

technologies, including COTS products, included in the UHIP? (2.3 ACA Operations and Technology Implementation To Date: Unified Health Infrastructure Project p.11)

Answer to question 77: Vendors should assume that all of the Contact Center technology initially listed in the UHIP RFP is to be provided, in accordance with your solution, within this contract and proposed in their RFP response. The UHIP RFP originally included contact center technology, but is not currently being pursued or included in development by RI's system integrator.[AS2] Vendor should propose the technology needed to support their solution. Vendor should include but not limited to personal computers, local area network equipment, ISP data services to the Warwick Data center, security devices, and or any other software and hardware that address your complete solution and provides a minimum of a tier 2 level of security/redundancy for the location.

Question 78: It is our understanding that the RFP scope of work for the UHIP included an electronic document management system, as defined in Appendix N: 6.1.5 and other sections. Please confirm that the Contact Center Vendor will employ the UHIP document management technology solution to support mail and application processing. Please provide information on the UHIP document management system and whether it includes scanning, document management, etc. If the Contact Center is to provide scanning equipment, please provide information on the OCR tools included in the UHIP EDM system, so that we can appropriately match technologies. (3.1.19 Mail, p.22)

Answer to question 78: The Contact Center will leverage RI's UHIP document management technology solution to support mail and application processing for all documents that are scanned into the UHIP system. The State's mailroom will process the majority of mail. The State will provide the Contact Center with scanning capabilities to process mail, applications and other documents that need to go into the UHIP system. Vendors need to consider whether or not they will need their own scanners for purposes of scanning paper into the CRM or other systems used by the Vendor, not related to UHIP. The Contact Center should leverage UHIP scanning and imaging solution, Percepta Image Now for scanning documentation into UHIP. ImageNow has interfaces available.

Question 79: If the Contract Center Vendor is to provide an enterprise content management (scanning, document management, etc.) technology solution to support mail and application processing, will this solution need to support back file conversion or will it be a day-forward solution? If back file conversion is required, please provide volumes, including file types and average size; largest file size, etc (3.1.19 Mail, p.22)

Answer to question 79: See answer to question 78.

Question 80: Please clarify whether the Contact Center Vendor is responsible for providing a letter generation technology solution to support outgoing mail, or whether this is part of the UHIP solution the Vendor will utilize. (3.1.19 Mail, p.22)

Answer to question 80: UHIP will support system generated outgoing mail requirements via the State's mail room/fulfillment center. The Vendor will utilize this capability.

Question 81: The RFP requires "Client Size," but also requires "Consumer Population Served (Number of Consumers)." Please provide guidance on what information is requested for "Client Size" when the reference is a government entity?" (4.1 Vendor Qualification, p.27)

Answer to question 81: Vendor should provide information on the size of the population they are serving, whether it is state, town, region, number of customers, etc. The Vendor can represent the number of customers they are servicing to give RI an understanding of capacity and volume handled.

Question 82: Should the tables be labeled 3a, 3b, and 3c instead of 2a, 2b, and 2c? (App. B, Tab "(3) Extended Bus. Hours)

Answer to question 82: Yes.

Question 83: Would the State please remove or revise this definition as it is overly broad or narrow to bidding entity? (RFP Section 5, Proposal Submission, p.30)

Answer to question 83: No. Rhode Island cannot remove or revise this definition. The State is concerned about collusion.

Question 84: Would the State agree to limit Bidder's aggregate indemnity and liability to the annual value of the fees paid by the State? Or, alternatively, make the cap equal to that of the State's liability?

Answer to question 84: Yes. The State will agree to limit or cap the Bidder's aggregate indemnity liability at two times the annual value of the fees paid by the State.

Question 85: Would the State agree to limit Bidder's aggregate indemnity and liability to the annual value of the fees paid by the State? Or, alternatively, make the cap equal to that of the State's liability? General Conditions 35, Terms and Conditions Section 22, 23, 23.2, 24.2

Answer to question 85: See answer to 84 above.

Question 86: While we understand that there are performance requirements, would the State remove acceptance requirements for ongoing services as these are not point-in-time deliverables? (General Conditions Sections 8, 17a, 19)

Answer to question 86: No. The General Terms and Conditions are required pursuant to State regulations. The Exchange will endeavor to administer the contract in accordance with best practices, but the contract must be administered consistent with the General Terms and Conditions.

Question 87: Would the State be amenable to minor technical adjustments to the insurance requirements or accept Contractor's standard insurance coverage? (General Conditions Section 31, RFP Sections 7.1 and 24)

Answer to question 87: Substantive changes to the language will not be accepted.

Question 88: Would the State agree to pay all invoices within thirty (30) calendar days as is the case on other State contracts?

Answer to question 88: Yes, as long as the invoice, documentation and services provided are all in order.

Question 89: Would the State agree to cap the amount of or predefine specifically the conversion assistance that is being requested? (Terms and Conditions 30, XLVIII)

Answer to question 89: The State has already limited the conversion assistance in terms of time. See Section 30 of Appendix D: Terms and Conditions (the "Contract"), which provides that the Conversion Period shall not exceed 180 calendar days and shall not extend beyond the Term by more than 60 days.

Question 90: In the event of termination for unavailability of funds, would the State agree to compensate Contractor for: (i) partially completed deliverables and work in progress that substantially complies with the Contract specifications; (ii) any unamortized costs incurred by Contractor in the start-up or preparatory phase of the Contract; (iii) the cost of settling and paying termination settlements under terminated subcontracts and leases; and (iv) other reasonable wind down expenses? Additionally, would the State agree to add language to allow Contractor to stop work without further liability in the event of unavailability of funds? (Terms and Conditions, Section 9, XIV)

Answer to question 90: The State will not compensate the Contractor in the event of termination due to unavailability of funds beyond the date of termination. In addition, the State will not add language allowing the Contractor to stop work without further liability, other than for payment for services provided through the date of termination, in the event of unavailability of funds. Sixty (60) days notice will be provided.

Question 91: In the event of termination for convenience, would the State agree to compensate Contractor for: (i) partially completed deliverables and work in progress that substantially complies with the Contract specifications; (ii) any unamortized costs incurred by Contractor in the start-up or preparatory phase of the Contract; (iii) the cost of settling and paying termination settlements under terminated subcontracts and leases; and (iv) other reasonable wind down expenses? (Terms and Conditions, Section 28, XLVII)

Answer to question 91: Yes, the State will compensate the Contractor for reasonable costs of work in progress and for reasonable wind down costs

in the event of termination for convenience. Additionally, notice for termination for convenience will be sixty (60) days.

Question 92: Is there any proposed consumer process workflow diagram for the web portal, contact center and in-person assistance? (Section 2.1, p.8)

Answer to question 92: Rhode Island's customer service strategy is to provide robust support through a variety of channels in order to support customers in a way that is convenient, flexible and meets their needs. The web, contact center and in person assistance will provide consistent services and support depending on the customers preference. The customer will also be able to switch channels as needed, for example, move from self service on the Web to getting assistance at the Contact Center with an experienced CSR. Customers will enter the system in a variety of ways and in no specific order, as described on page 9 of the RFP, Rhode Island's Customer Experience. Rhode Island is developing documentation for operational needs, processes, and workflow; the State will work with the Contact Center vendor to implement these processes.

Question 93: Facilitate acceptance of payments through various means (credit, debit or other forms of electronic payment deemed acceptable by the Exchange), in accordance with procedures established by the State and the State's financial management vendor under the UHIP contract. What are these procedures and consumer's payment process? What occurs if a resident fails to submit payment? (section3.1, Task p. 14)

Answer to question 93: Payment management and administration is the responsibility of the Premium Billing portion of the contract. However, as detailed in responses to Questions 13, 14, and 49 the Contact Center Vendor will be responsible for maintaining the interaction history and be able to communicate with the customer to clarify and address payment issues.

Question 94: To help Offerors price and to predict staffing levels for the contact center, will the State provide an average handle time? For example, what does the State expect for a length of a call? (Section 6.1, p.37)

Answer to question 94: See responses to Questions 4 and 73.

Question 95: Will the State please provide a daily, weekly and/or monthly expected call volume forecast?

Answer to question 95: See answer to Question 73.

Question 96: What is the expected enrollment number?

Answer to question 96: See the Answer to Question 73.

Question 97: To provide the Division with the details required in Section 5.1, will the Division change the page limits to 50 pages? To describe vendor's approach to all of the

tasks in Section 3 may hinder vendors from providing sufficient details of their approach. (5.1, p. 31-32)

Answer to question 97: See answer to question #39.

Question 98: Is it permissible for more than one of the key personnel roles to be filled by one person (for example, could one person serve as both the Quality Manager and Training Manager)? (3.1.10, p.19-20)

Answer to question 98: Vendors can propose staffing models that fulfill the Key Personnel requirements listed on pages 19-20 of the RFP; if Vendors feel that these roles can be combined in some way, they should explain their rationale, with the understanding that RI must approve staffing plans and can change them over time if the State's needs are not being met.

Question 99: In order to ensure ample lead time and hire the most highly-qualified staff members, may Offerors provide job descriptions and/or required qualifications in lieu of naming individuals to fill any of the key personnel positions? (3.1.10, p.19-20)

Answer to question 99: Yes. As described on page 20, Vendors must at least explain key responsibilities of these positions.

Question 100: What will the length of State-provided training be for contact center specialists? (3.1.11, p.20)

Answer to question 100: See responses to questions 20 and 56. Rhode Island is in the process of collecting content for training and will provide estimated times as soon as the information is available. Vendors can use 4 weeks as a baseline with additional ongoing and refresher training required as the program evolves and develops. Vendors should also identify and propose their own training requirements, as explained on page 20 of the RFP.

Question 101: What is the length of the State certification process for the contact center specialists?

Answer to question 101: There is not "length of the State certification process" because there are no certifications required. See response to question #21.

Question 102: Can the State provide the details of the marketing plan for the consumer outreach and timing?

Answer to question 102: While specifics are still in development, RI anticipates statewide outreach and marketing to begin in the summer of 2013, encouraging people to go to the website, and then in early October 2013 would expect significant amount of coverage that will drive inquiries to the contact center.

Question 103: How many times does the State expect each qualified resident to contact the center annually and during Open Enrollment Period respectively? Of the qualified resident, what percentage are expected to call the center versus enroll through the web portal?

Answer to question 103: See answer to Question 73. Vendors should use their experience to identify and propose percentage of customers who use phone vs on-line services.

Question 104: When are the UHIP API interfaces and documentations scheduled to be available? (2.3, p.10-11)

Answer to question 104: The State will inform the Contact Center Vendor once this date is established with the State's system integrator. Please see response to question #6.

Question 105: What role does the RI HBE plan on taking as it relates to onboarding, orientation, teaching them how to effectively use their plan? Will this be part of the Contact Center role or will this be part of the agreements with the health Plans that provide QHPs to the State?

Answer to question 105: RI customer service strategy is to provide one stop shopping for customers. To that end, the Contact Center vendor should be as thorough as possible and provide as much information as available to the customer. For example, as the RFP states on pages 13-14, section 3.1 Key Functions and 3.1.1 Typical Inquiries of the Contact Center, RI does see the Contact Center as: "Provide information on Qualified Health Plan (QHP) offerings, including provider information and basic benefit information."

The Contact Center will establish workflows and transfers across organizations, including issuers. For more information on referrals to other service delivery partners, please see page 16 of the RFP, Organization of Work.

Question 106: Item 12. Can the State provide the details on your on-site security requirements? (3.2.11, p.25)

Answer to question 106: Please refer to Section 3.2.11, page 24 in the RFP. See Answers to Questions 60 and 61.

Question 107: Please indicate where in the proposal the bidder should cite the statutory authority for designating in the proposal the proprietary and confidential information.

Answer to question 107: The vendor may indicate sections of the proposal it believes is not subject to Public disclosure and cite the specific exemption under RIGL 38-2-2. However, the Division of Purchases will make the final determination of what should not be disclosed. The citation

should be in the disclaimer and should reference the specific sections to which it applies.

Question 108: How will the 10% MBE goal be evaluated in the points given to each bidder?

Answer to question 108: There will not be points awarded specifically for being an MBE. However, every successful vendor must submit an MBE plan to the MBE compliance officer.

Question 109: If RI decides to keep parents with minor children up to 175% FPL in Medicaid, what is the role of the Contact Center with respect to these individuals?

Answer to question 109: As explained on page 8 of the RFP, all Rhode Islanders will be able to go to the Contact Center for support. All individuals who want to enroll in a health coverage program in Rhode Island could use the new Contact Center. See section 3.1.1 for Key Functions and Typical Inquiries to see what the Contact Center will be responsible for in relation to all customers.

Question 110: Will RI expand Medicaid to individuals with minor children <133% FPL and, if yes, what is the role of the Contact Center with respect to these individuals?

Answer to question 110: See answer to Question 109.

Question 111: Please explain what is meant by “service areas” in the bullet “shared technology and key customer information across service areas.”

Answer to question 111: Page 9 of the RFP describes the Customer Service principles held by Rhode Island. This point specifically refers to all customer service areas (i.e. Human Services, OHIC, Exchange, etc.) within RI being able to share the same technology, which allows for access to the same customer information regardless of the office you are in.

Question 112: The RFP indicates that the Contact Center provider will be required to interface with the UHIP systems. What is the architecture of the UHIP system and what is the expected architecture of the interfaces?

Answer to question 112: See answer to Question 104.

Question 113: Is the UHIP vendor required to support co-browsing? If so, is the UHIP vendor supporting that technology? If not, is the Contact Center supporting services strictly through telephonic means?

Answer to question 113: The systems integrator does not currently provide this capacity. If Contact Center vendors have the ability to support co-browsing, vendors should propose this ability in their proposal. RI will evaluate this capability as one component of the technology proposals.

Question 114: How many small group employers does RI anticipate participating in the SHOP program?

Answer to question 114: Please refer to page 12 of the RFP, where the table shows a break down of populations, including small group employers.

Question 115: The RFP states that the Contact Center will support inquiries from issuers – approximately how many calls a month can the vendor expect from this channel?

Answer to question 115: Rhode Island is working closely with Issuers to identify handoffs and clearly delineate roles and responsibilities around service. The Contact Center Vendor will need to support handoffs from the Issuers as customers will call them inadvertently, as well as answer questions about the Exchange or its policies and procedures from the Issuers.

We do not currently have a calibration or estimation on the number of anticipated issuer calls into the Contact Center. Bidders are encouraged to provide estimates and logic behind those estimates but are discouraged from attempting to set bounds on such estimates in their pricing.

Question 116: The RFP states that the Contact Center will support navigator and broker communities. Will this support be exclusively for inquiries with regards to consumer actions or will inquiries be in support of navigator and broker management, such as training, certification, payment issues?

Answer to question 116: The Contact Center will support Navigator and Broker inquiries as they relate to the customer. The Contact Center will act as a resource to those providing in person customer service. The Contact Center will not support management of the Broker/Navigator programs, such as training and Broker/Navigator compensation.

Question 117: What are the existing customer support systems and services?

Answer to question 117: As referenced on page 20 of the RFP in the Organization of Work table, RI currently services customers through various state agencies, such as Medicaid, DHS Field Offices, OHIC and the Consumer Assistance program at RIPIN.

Question 118: What is the role of the Contact Center for individuals entering the process through DHS?

Answer to question 118: DHS Field Staff should be able to refer customers to the Contact Center if they are not able to assist with a newer

health coverage program available through the Exchange, or for assistance navigating the Website.

Question 119: How many navigators does RI expect to have participating in the exchange? How many brokers? In-person assisters? Certified application counselors?

Answer to question 119: RI is developing our Broker and Navigator programs; we do not have an estimated number of participants yet.

Question 120: What portion of the existing Medicaid population (191,000) will be using the Contact Center, and for what purpose?

Answer to question 120: Potential Medicaid customers will be using the Contact Center as they attempt to navigate the Web Portal and may have a variety of questions, including eligibility related inquiries, as listed in the RFP on page 15, where there is a complete list of Typical Inquiries. In addition, refer to page 16, which explains that Medicaid customers also access the DHS Field Offices for assistance, and will continue to do so if they choose.

Question 121: Please confirm that the column entitled “Medicaid” refers to MAGI Medicaid and the column entitled “Over 65” refers to Non-MAGI Medicaid.

Answer to question 121: The column labeled Medicaid with a total of 191 refers to all respondents of the ACS 2011 survey who indicated that they are enrolled in Medicaid. This survey did not make a distinction between MAGI and Non-MAGI Medicaid. Additional information on Medicaid enrollment can be found in the Annual Medicaid Report to the Legislature available on the DHS website.

Question 122: Is the American Community Survey Data from 2011 representative of the numbers from 2011 or a projection for 2013? If the former, what growth factor is reasonable to use for RI to project current actual populations?

Answer to question 122: The American Community Survey Data from 2011 is representative of survey conducted throughout 2011 on a rolling monthly basis. It is not a projection. Growth rates for RI population may be available from the Census Bureau.

Question 123: What is the average family size for Rhode Island?

Answer to question 123: A measure of this can be found by dividing the total number of households in ACS by the total population. However households do not necessarily represent a "family" for insurance purposes.

Question 124: If a Bidder has the capability in full for a requirement specified in Appendix C, and the capability is described in the technical proposal within the limits of the page requirement, what additional information should be provided in the last column of Appendix C (how they will provide the capability)?

Answer to question 124: Vendors should cross reference readers to the correct section of the Technical Proposal as needed.

Question 125: The RFP requires the vendor to “assist individuals with applying for health coverage”. Does this include accepting applications over the phone (without the assistance of co-browsing)?

Answer to question 125: Yes.

Question 126: Will information on provider networks be on a plan by plan look up or will a consolidated provider directory across all QHPs be available to the Contact Center?

Answer to question 126: Rhode Island technology solution is on track to include a provider directory across all QHPs that would be available to the Contact Center staff for October 2013. As a contingency for technology not being ready, plan-by-plan look up will be available.

Question 127: What does it mean for the Contact Center vendor to “record all web” inquiries and “report on web site”, given that the web portal is the responsibility of the UHIP vendor?

Answer to question 127: Specific to the RFP, page 19, ‘Customer Satisfaction and Customer Feedback on Products, Services, and web site’, RI is referring to the Contact Center Vendor capturing customer feedback, including any feedback they give to a CSR on the web site. Similarly, on page 13 of the RFP, where it states that Contact Center Vendor should “Record all telephone, web, email, live chat inquiries”, it refers to the CSR documenting in the CRM any contacts from customers, whether it be through the web chat functionality, email, text, phone, or mail.

Question 128: Please provide more information about what kind of incoming mail is expected and the Contact Center’s functional responsibilities associated with it.

Answer to question 128: Please refer to Answer to Question 51.

Question 129: Given that there is a separate premium-billing vendor, what specific kinds of Contact Center tasks are required to “facilitate acceptance of payments through various means”?

Answer to question 129: Please refer to Answer to Question 13.

Question 130: What data screens will be available to the Contact Center from the Premium Billing vendor and what access will the Contact Center have to make modifications in the Premium Billing system?

Answer to question 130: Please refer to Answer to Question 14.

Question 131: Will UHIP be providing a level 2 help desk staff to support complex system issues beyond password resets and log in credentials?

Answer to question 131: Vendors will be able to access the State/UHIP Help Desk for support with the UHIP system. Service and technology support for Vendor's desktop applications will be their own responsibility.

Question 132: For the Complaints and Appeals processing, is it expected that all such requests coming via the Contact Center be created and processed within UHIP only or can we assume that they get created and processed in the CRM solution? If we can work it in the CRM, do we then need to publish these records to UHIP?

Answer to question 132: See Answer to Question 133.

Question 133: The RFP implies that complaints and appeals will be worked in the call center CRM and not in the UHIP system of record. The RFP also states that complaints and appeals workflow is a core component of the UHIP system. Which system will be the system of record and in which system will Contact Center staff work the complaint/appeal?

Answer to question 133: Complaints and appeals will not be “worked” by the Contact Center but the Contact Center staff will assist the consumer in terms of identifying complaints or appeals and referring to the appropriate organization with the jurisdiction to process that customer’s issue. Exchange and Medicaid complaints and appeals will eventually be housed in the UHIP system, which will be the system of record, if not for October 2013, close to it. The Contact Center should assume that all contacts, including complaints and appeals, be logged in the CRM.

Question 134: Please explain what Contact Center duties are associated with “Automated Eligibility Determination,” given that the eligibility system, and its underlying automated eligibility algorithms, are the responsibility of the UHIP vendor.

Answer to question 134: Contact Center duties are to facilitate and assist customers through all of the typical customer inquiries, as listed on page 15 of the RFP. For example, if a customer calls because they are on the RI

Web Site seeking their eligibility status and they don't understand what income verification means, they should be able to call the Contact Center and get the support they need to complete that inquiry. The UHIP system will determine eligibility, but the Contact Center staff will help the customer use the system and understand its associated policies, procedures and programs.

Question 135: Will authenticated Contact Center personnel be able to view and edit any applicant or enrollee record within the UHIP system?

Answer to question 135: Contact Center staff will have clear user responsibilities and permissions in the UHIP system. CSR's will be able to view screens and perform transactions as needed to support the functions and customer inquiries required on pages 14-15 of the RFP.

Question 136: Of the typical inquiries listed, which are transactional based?

Answer to question 136: Of the typical inquiries listed on page 15 of the RFP, many of them could be informational or transactional, such as APTC determination, eligibility screening or determination, appeals, certificate of exemption, renewals, depending upon what level of support the customer needs. The customer may have a simple question, or may need the CSR to perform the transaction for them.

Question 137: Does the state envision a certificate of exemption process that allows individuals to attest to an exemption or will the Contact center be responsible for requesting, collecting, and/or verifying information supporting an exemption?

Answer to question 137: The State is in the process of developing and elaborating processes and procedures. Whenever possible the State is creating automated and user-friendly processes. The State will provide details around certificate of exemption policies and procedures to the selected vendor, as well as others processes, as soon as clearly identified.

Question 138: How are the responses associated with premium payment the same or different than "facilitate acceptance of payments through various means."? (page 14—section 3.1)

Answer to question 138: See Answer to Question 14. There is no difference.

Question 139: Please quantify which inquiries require warm transfers.

Answer to question 139: RI is committed to providing customers with exceptional service, one stop shopping and integrated service with minimal transfers and easy transition across channels and agencies, as stated on page 9 of the RFP. In that spirit the State plans to set up partnerships with other organizations where the customer calls can be introduced without the customer having to repeat their issue or call another number. For more information on which agencies the Contact

Center will be referring customer to, see page 16 of the Organization of Work table.

Question 140: What duties or support responsibilities will the Contact Center have in regard to Rhode Islanders already enrolled in commercial health insurance coverage?

Answer to question 140: The Contact Center should answer questions from any Rhode Island citizen who calls with general questions about the Affordable Care Act, the Health Benefits Exchange programs and coverage options, regardless of their existing coverage.

As explained in page 18 of the RFP, Complaints and Appeals for commercial health insurance customers is handled by RIPIN. Beyond December 2013, it is the State's desire that formal commercial health insurance complaints and appeals continue to be administered through the Contact Center so as to ensure early and satisfactory resolution of as many concerns as possible, and a seamless experience for customers. The Vendor should propose how to meet these goals and provide a continuation of the services currently provided by RIPIN starting in January 2014.

Question 141: What is considered a "complex" Medicaid issue? Are mixed family situations considered complex (for example, one adult on APTC, one on Medicaid)?

Answer to question 141: On page 17 of the RFP, organization of work table, section 3.1.2, Rhode Island references complex Medicaid, meaning customers who are on Medicaid for disability or other reasons, not for affordability reasons. These customers are considered 'complex' because the process for determining eligibility is more intensive and will continue to be serviced completely through the DHS Field Offices. The Contact Center will refer any such customer inquiries to the DHS Field Offices, and will receive the necessary training on identifying those instances.

Question 142: Will all existing Medicaid come through the Contact Center for recertification? Will the UHIP system be the system of record for Medicaid going forward? If so, what is the plan for converting this population into the exchange or UHIP system?

Answer to question 142: Rhode Island anticipates Medicaid eligible customers may work through the UHIP portal for Medicaid redeterminations. In the future Medicaid redeterminations will be fully converted to UHIP, which will be the system of record. DHS Field staff will also continue to support Medicaid redeterminations for these customers.

Question 143: Is the Contact Center referring callers with credit card payments to the UHIP vendor call center or to the UHIP IVR?

Answer to question 143: Refer to Answer to Question 14.

Question 144: Please provide the volume of calls and associated handle times for the OHIC vendor (RIPIN) that will become the Contact Center responsibility after December 2013.

Answer to question 144: OHIC has not fully transitioned to RIPIN due to delays and changes to our OHIC website. There is currently no historic data. Data can be provided to the selected vendor as soon as it becomes available.

Question 145: Please confirm that the Vendor is to provide pricing starting January 2014 for the formal complaints and appeals process for commercial health insurance coverage currently operated by RIPIN. Please also confirm that the list of services provided by RIPIN on RFP page 18 is an exhaustive list of services and represents the entirety of the scope of work the Vendor will take on for commercial health insurance complaints and appeals in January 2014.

Answer to question 145: Please see answer to Question 38. In order to assist in the process of complaints and appeals the Contact Center will need to discern what constitutes a complaint and/or appeal and in doing so will need to be able to answer general health care “system” questions i.e. consumer assistance/inquiries.

Question 146: Please indicate whether RIPIN policies, procedures, training modules and other relevant information will be turned over to the Contact Center vendor.

Answer to question 146: Any information that the State has for training materials will be provided to the selected Contact Center Vendor for their staff.

Question 147: Please confirm that the required comprehensive QA/QC program is sent for approval after contract award.

Answer to question 147: Vendor should provide a summary of the Quality Assurance programs utilized in their Contact Centers in their response to Rhode Island. Detailed program information will be expected for review and approval after the contract is awarded.

Question 148: Will the Contact Center training curriculum and trainers need to be available to Navigators, Brokers, assisters, application counselors, DHS offices, and/or other stakeholders? If so, how many people will need to be trained? May the training be web-based or does the state expect in-person training?

Answer to question 148: Contact Center Trainers will train Contact Center staff and potentially customer service staff from other State agencies. As referenced in the RFP on page 20, section 3.1.11 Training, there will be “Train the Trainers” provided to the Contact Center Trainers, they in turn should use methods they feel are most effective and successful to train other staff, based on their training expertise, including web based and in person sessions.

Question 149: Please clarify the hours of operation for walk-in support.

Answer to question 149: Vendors should propose a plan for meeting Rhode Island's need for Walk In support, including hours of operation. 24/7 walk-in support is not required. See page 21, section 3.1.14 in the RFP for more details around this request. In addition, please refer to Question #54 regarding Walk In support at a location other than the Contact Center.

Question 150: Please confirm that emails can be generated from the members' online account homepage and that the email channel is limited to this thruway as outside emails from public domains cannot be authenticated.

Answer to question 150: The Contact Center may receive emails from members, as well as general inquiries from the public who may not yet be enrolled in coverage.

Question 151: The RFP states "calls/communications may be needed, for example, to target enrollees needing to recertify, ..., to ask applicants for documents needed to verify information, ...". How is the Contact Center system going to be notified or made aware of the renewal / recertification population to contact, or of applicants who are missing information or documentation?

Answer to question 151: The Contact Center will need to make outgoing calls as follow up to customer inquiries. In addition, the RFP section 3.1.17, page 21 references outgoing calls that may be initiated by RI as part of outreach programs to remind customers of renewals or to finalize enrollment. This customer information be generated from the UHIP system and available to Contact Center staff.

Question 152: Please confirm that the UHIP vendor is responsible for aggregating, transmitting and managing the outbound notice files and the Contact Center vendor is responsible for executing on those files once submitted.

Answer to question 152: Outbound mail will largely consist of notices generated and recorded automatically from the UHIP system, which will be fulfilled and mailed out from the State mailroom. The UHIP vendor is responsible for managing outbound notice files. The Contact Center vendor is responsible only for mail directly related to customer inquires, support, and follow-up as described in the response to questions 40 and 51.

Question 153: The RFP requires that the vendor have the capacity to place outgoing communications (calls, emails, texts). Does this include mail?

Answer to question 153: Please refer to Answer to Questions 51, 78 and

Question 154: Please confirm that the vendor is only responsible for outbound mail which occurs as a direct result of requests made of the Contact Center.

Answer to question 154: Please refer to Answer to Question 51.

Question 155: Is outbound mail limited to consumer-requested individual documents and forms? If mass or group mailings are also expected, please give examples.

Answer to question 155: Mass or Group mailings from the Contact Center are not expected. These types of mailings will be fulfilled at the State Mail Room. The Contact Center will be notified when any such larger customer mailings are generated. Please refer to Answer to question 51, 78 and 80.

Question 156: Will the vendor receive inbound mail from individuals that was not generated by the vendor? If so, please provide the volumes that will be associated with this mail?

Answer to question 156: As section 3.1.19, page 22 in the RFP describes that incoming mail *not* generated by a CSR's follow up with a customer will *not* be processed by the Vendor.

Question 157: Please confirm that "receive" is defined as opening and sorting the mail; "process" is defined as scanning and data entry; "resolve" is defined as sent to a document management system; please also confirm that the "process and resolve" steps will be done by Contact Center staff in the UHIP system and functionality will not be supplied as new technology by the Contact Center.

Answer to question 157: RI confirms the definitions outlined in Question 157 for "receive" and "process". Receiving and processing mail will also include logging the mail being addressed by the CSR into the CRM, as with all contacts that come into the Contact Center. Mail received, processed, and resolved also needs to be logged into the CRM. "Resolve" could include sending to the UHIP document management system, but also calling back a customer, or finishing a transaction as a result of receiving the mail. Processing, or scanning, will be to the UHIP system. A scanner used for the purpose of getting a document into the UHIP system will be supplied by RI. See Answer to Question 78 for related details.

Question 158: The RFP states that "the UHIP technology solution will be deployed and used almost identically by Customer Service staff in the Contact Center, as other State agencies, by Navigators, Brokers and at the DHS Field Offices". Will the deployed technologies include summary screens or administrative screens that are specialized to back office workers? Will the deployed UHIP technology include power screens specially designed for the rapid data entry needs of a back office or CSR worker?

Answer to question 158: Rhode Island is in the process of identifying roles and responsibilities for the various UHIP users, including Contact Center

staff and Management team. Staff will have the technology functionality they need to perform the duties outlined in the RFP. Vendors should propose any technology functionality they want to suggest CSR staff have in their RFP response.

Question 159: Will the Customer Service staff in the Contact Center have administrative access to each UHIP module, and the required eligibility & enrollment tools (such as the eligibility screener, affordability calculator, broker search/lookup, etc.)?

Answer to question 159: See answer to Question 158. This includes eligibility and enrollment tools, screener, calculator, Broker and Navigator search functionality.

Question 160: Please clarify the state's intent in giving community-based Navigators and Brokers access to the CRM system. What information will they need that is not already available through the web portal? Will it be read-only or is the state assuming these groups and individuals will have the ability to modify or update data as well?

Answer to question 160: As explained on page 23, section 3.2.5 of the RFP, RI's goal is to create a seamless customer experience. All representatives of the State, including Contact Center, state agencies and Navigators will be expected to provide a high level of service to the customer, and to log their customer interactions as a way of recording their work and tracking the customer's history. The CRM would be used by the Navigators to view important customer information that has been recorded in the CRM by the Contact Center, as well as to record the Navigator's customer interactions.

Question 161: How many additional licenses should the Vendor plan to procure on behalf of state agencies or community based Navigators, Assistants and Brokers? Please provide a list of contact center technology solutions which Rhode Island will require the Vendor to provide to state agency staff members and community based Navigators, Assistants and Brokers.

Answer to question 161: Please see Answer to Question 12.

Question 162: Aside from the web services, will there be an enterprise service bus to facilitate the exchange of data between the contact center and the UHIP system?

Answer to question 162: See Answer to Question 6. Yes there will be an enterprise ESB in UHIP.

Question 163: Please provide the record retention policy for electronic signatures.

Answer to question 163: Electronic signatures are among the items to be retained, by policy, for 10 years.

Question 164: Can we assume that UHIP will provide a document repository to store scanned images received via mail along with some identifiers as well as be able to view / retrieve these images upon request from the repository?

Answer to question 164: Yes, and please see Answer to Question 78 for more details on the technology.

Question 165: Please clarify wording of sentence “While vendors should demonstrate...” Is the structure for experience descriptions in addition to “experience in operating Contact Centers for at least 3...”?

Answer to question 165: Yes.

Question 166: What is the estimated timeframe to issue a state Purchase Order?

Answer to question 167: It depends on the circumstances and how quickly the vendor can provide the required information and certifications. Because the agreement is attached to the RFP, the State expects that the selected vendor will sign immediately. The standard time given to vendors to complete the contracting process is 21 days.

Question 168: What is the mechanism for a vendor to provide “substitutions” under the single proposal format? Can the vender offer alternate cost proposals which address the substitutions?

Answer to question 168: Vendors may propose “substitutions” within the body of the technical proposal. The State reserves the right to reject any proposed substitutions in favor of the original request. The vendor can offer costs associated with the substitution within the body of the cost proposal.

Question 169: While the narrative of the technical and cost proposals must be at least 12 point Times Roman, may smaller font sizes be used for exhibits within the technical proposal, such as graphics, charts, or tables and their accompanying captions?

Answer to question 169: See response to question #26.

Question 170: May we include additional attachments, such as a sample QA/QC plan, training materials, Continuity of Operations Plan, or other items that illustrate how particular deliverables would be accomplished?

Answer to question 170: Yes.

Question 171: Please define what the state desires in the vendor or subcontractor resumes required in the qualifications section

Answer to question 171: See response to question #32.

Question 172: Under what circumstances would the Exchange consider cost alternatives to per contact as the method of payment?

Answer to question 172: The State will entertain alternative approaches to cost per contact if proposed as part of the cost proposal submission. The vendor must, at minimum, submit a proposal in the format requested in Appendix B. Any alternatives proposed would be *in addition to* this format.

Question 173: The RFP requests that bidders model a cost per call based on a monthly volume of 75,000 calls. Can the vendor model a lower call volume with lower handle times for the second year of this project?

Answer to question 173: Bidders should propose cost models according to their industry expertise. Scores for the cost of ongoing operations will be developed according to the instructions for Tables 2c and 3c. The 75,000 contacts per month is *hypothetical*, for benchmarking purposes only. Vendors will be compensated according to the cost structures proposed in Table 2b or 3b, unless an alternate format is proposed and accepted by the State.

Question 174: What is the evidence required to substantiate # of contacts?

Answer to question 174: Please provide any assumptions used to estimate # of contacts in your cost proposal.

Question 175: What is the 4th payment event?

Answer to question 175: As described in the instructions to Appendix B – “Start up costs” tab, “Vendors should propose Milestone #1 - “N” relevant to the cost and pricing structure put forth in this table. Rhode Island has established two required milestones, October 1, 2013, which is the start date of our first open enrollment period and January 1, 2014, when coverage initially becomes effective for customers. Please propose additional milestones for RI’s review. Vendors should propose the milestone payment schedule by proposing additional milestone dates and categories of spending for each milestone date, and a total dollar amount for each milestone, as well as providing the detailed build up of the budget to arrive at that total.” The required milestones do not necessarily need to be the 4th and 6th payment events if the vendor proposes fewer or a greater number of milestones.

Question 176: Please define industry standards to be used in this contract.

Answer to question 176: When the State refers to industry standards throughout this RFP, it is to imply that the Vendors responding to the RFP

are in the Contact Center industry, thus familiar with their operations and are experienced in benchmarks, standards for high performing contact centers, excellent customer service, etc.

Question 177: Please specify the amount of SLA credits to be invoked.

Answer to question 177: The SLA Credit amounts will be negotiated with the successful Bidder. Bidders can propose SLA credits to be invoked in their proposals.

Question 178: Please clarify the relationship between SLAs corrective action report and the SLA credits.

Answer to question 178: The corrective action report is among the ways by which that SLA Credits are triggered under Appendix D: Terms and Conditions for this RFP (the "Contract"). The State may become aware of performance issues giving rise to SLA Credits by other methods, of course, including the State becoming aware of Contractor performance issues on its own. Upon an event giving rise to the assessment of SLA Credits under the Contract, they will be assessed in accordance with terms and conditions of the Contract.

Question 179: Please clarify the difference between “auto dialing customer satisfaction inquiries” and the third party customer satisfaction surveys.

Answer to question 179: Contact Center vendors familiar with survey methods should know the distinction between these two different methods for completing customer service/satisfaction surveys. Please see Answer to Question 64 for additional information.

Question 180: To meet the service levels proposed (95% in 60 sec, 85% in 20 sec), will require an abandonment rate of less than 1% and force bidders to have to over-staff to meet a standard that does not match the proposed abandonment rate (between 3 and 5%). Can bidders propose service level standards that are consistent with the abandonment rate, which still provide a strong level of customer service?

Answer to question 180: Service Level targets listed in the RFP, Appendix C, are based on best practice obtained from industry leaders. Vendors may provide alternative targets based on experience along with explanations of they feel this target makes more sense for RI and its customers.

Question 181: The contact center is required to facilitate electronic payments, will CSRs have access to the UHIP financial management module or will this require an integration to the CRM?

Answer to question 181: See Answer to question 14.

Question 182: Should table 2a contain all estimated costs for the entire program? If so, at what contact volume should this table be developed?

Answer to question 182: Table 2a should contain all estimated costs for the entire program. The contact volume used to develop costs for the program should reflect the vendor's industry expertise, as described in response to question 73 and on page 12, section 2.3.2 of the RFP.

Question 183: Should table 2b contain all estimated costs for the entire program? (Appendix B)

Answer to question 183: As described in the instructions, Table 2b should be used to propose how the vendor will be reimbursed for cost per contact by volume each month. Cost per contact provided by monthly volume in Table 2b will be cumulative. i.e. for the first 9,999 contacts, the vendor will be reimbursed \$X/contact, for contacts 10,000 - 19,999, the vendor will be reimbursed \$Y per contact, for contacts 20,000 - 29,999, the vendor will be reimbursed \$Z per contact, etc.

Question 184: Approximately how many state co-located staff should the vendor plan to accommodate on the premises?

Answer to question 184: See response to question 11.

Question 185: Are the 75,000 contacts a month inclusive of web, email, chat, mail and phone? If so what distribution should we consider?

Answer to question 185: Yes, the 75,000 contacts per month used to benchmark vendor proposals does include web, email, chat, mail and phone. Vendors should use their experience to estimate distribution of contacts and most popular channels. RI assumptions are: phone, web, email, chat and mail, in that order.

Question 186: The cost evaluation criteria reference "a hypothetical estimate of 75,000 calls per month" whereas the instructions in Appendix B request "cost per contact". Since the Contact Center includes web chat and e-mail contact channels, please clarify if the hypothetical estimate is for calls per month, exclusive of other contact channels, or contacts per month, inclusive of other contact channels.

Answer to question 186: See Answer to question 185. This estimate of 75,000 includes all contacts to the center, not just calls.

Question 187: Given that detailed assumptions are included in the cost proposal, please confirm that the bidder can bind their cost to these assumptions.

Answer to question 187: The State is unsure exactly what “bind their cost to these assumptions” means. Any assumptions are estimates only and not a guarantee. The vendor will be held to the pricing provided in the cost proposal.